

# FSA University Registration System Reference Guide March 2002





#### REGISTRATION SYSTEM OVERVIEW

This guide serves as a resource for users of FSA University's new Registration System, which replaces the current registration website. The Registration System will contain all FSA University training events in a searchable, online catalog and will enable you to register for those events. In addition to registration, the System will show you upcoming FSA workshops, and provide you with your transcript. The System will send you automated email reminders of your upcoming training classes.

In order for the System to provide this information, you must set up a registration account. Setting up the account requires you to provide certain information about yourself (address, email, etc.) and select a username and password. The username and password allow you to log into the System and to get your personal information.

To register for classes, you must enter your username and password on the login page. If you want to search the catalog but do not want to register, you can select the browse option on the login page and view the events listed in the catalog.

When you log into the Registration System, you will enter through a login page that uses an application called Jamcracker. You will see the Jamcracker name on the login screen. If you have problems setting up your registration account or logging in, call the Jamcracker Support Center at the number provided. For questions about workshops, continue to call FSA University.

#### SYSTEM REFERENCE GUIDE OVERVIEW

This reference guide provides step-by-step instructions for using the Registration System. In addition to this guide, there is an on-line help feature in the System.

The system activities in this reference guide have been grouped into the following categories:

- Set-up
- Prior to conference/workshop
- ➤ After attending conference/workshop
- Maintenance

Refer to the table of contents for more details on the activities listed above.



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### CREATE A REGISTRATION ACCOUNT

Creating a registration account in the Registration System is a one-time activity that must be completed before registering for an FSA University conference or workshop. By entering your contact and organization information and by creating a personal username and password, you will be given a personal account in the Registration System.

FSA University recommends that you create a registration account when first accessing the Registration System from FSA University's Training Site (<a href="http://www.ed.gov/offices/OSFAP/sfau">http://www.ed.gov/offices/OSFAP/sfau</a>). However, it is possible to browse the conference and workshop offerings without creating a registration account.

The focus of this section is to learn:

➤ How to create a registration account

The following sections should be completed before beginning this section:

None

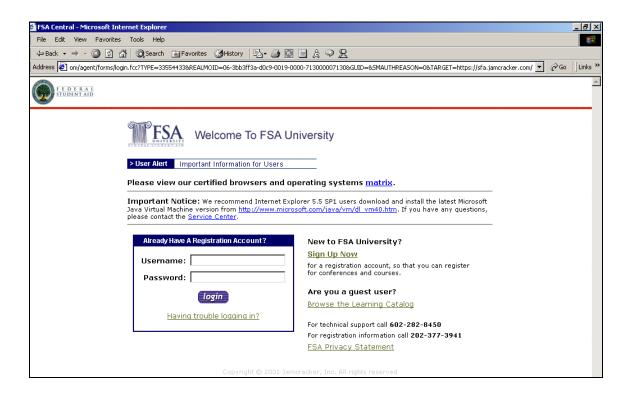
#### To create a registration account:

Step 1: From the FSA University Training site, click on the link to the Registration System.

A login page will appear.



# SFA University Registration System Guide Set-up: Create a Registration Account

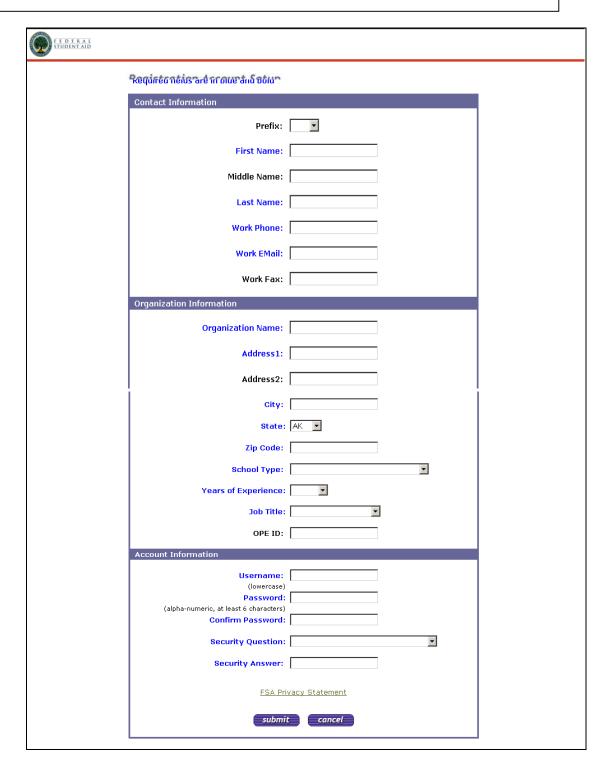


Step 2: Click on the "Sign Up Now" link to create a registration account in the Registration System.

A "Registration Account Setup" page will appear.



# SFA University Registration System Guide Set-up: Create a Registration Account





*Step 3:* In the "Contact Information" section, enter your personal contact information.

NOTE: THE REQUIRED FIELDS ARE IN BOLD AND BLUE TEXT.

Step 4: In the "Organization Information" section, enter your organization and address information. Select your school type, years of experience working with financial aid processing, and job title.

NOTE: IF YOUR SCHOOL TYPE OR JOB TITLE ARE NOT LISTED IN THE LIST OF OPTIONS FOR THE "SCHOOL TYPE" OR "JOB TITLE" FIELDS, THEN SELECT THE MOST APPROPRIATE OPTION OR SELECT "OTHER".

Step 5: In the "Account Information" section in the "Username" field, enter your personal username.

NOTE: THE USERNAME MUST BE BETWEEN 1-20 CHARACTERS IN LENGTH AND LOWERCASE. THERE CAN BE NO SPACES IN THE USERNAME BUT AN UNDERSCORE CAN BE USED.

Step 6: In the "Password" field, enter your personal password.

NOTE: PASSWORDS MUST BE AT LEAST 6 CHARACTERS AND INCLUDE LETTERS AND NUMBERS.

- Step 7: In the "Confirm Password" field, enter your personal password again.
- Step 8: In the "Security Question" field, select a question from the dropdown menu.
- *Step 9:* In the "Security Answer" field, enter the answer to the question selected in the previous step.

NOTE: MAKE SURE TO REMEMBER WHICH SECURITY QUESTION WAS SELECTED. IF YOU FORGET YOUR USERNAME OR PASSWORD, YOU WILL NEED TO KNOW THIS SECURITY QUESTION AND ANSWER.

Step 10: Click on the "Submit" button.

A "Registration Account Setup Pending" window will appear.



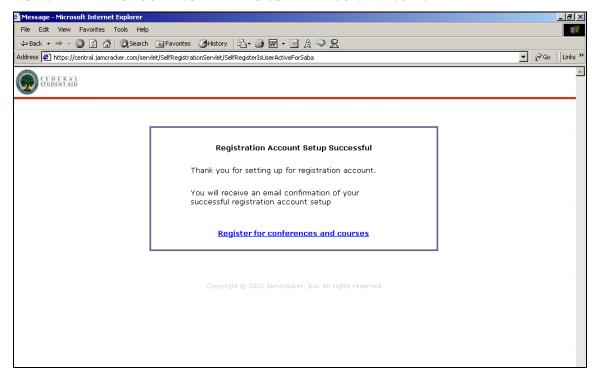
# SFA University Registration System Guide Set-up: Create a Registration Account



# *Step 11:* Wait until your registration account is set-up.

A "Registration Account Setup Successful" window will appear.

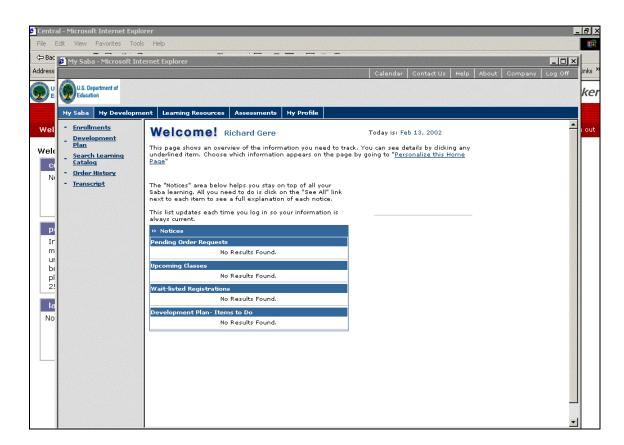
### NOTE: THE WAIT SHOULD NOT TAKE LONGER THAN ONE MINUTE.





Step 12: Click on the "Register for conference and courses" link to launch the Registration System.

A temporary "Welcome to FSA University" window will appear. After several seconds, the Registration System will launch automatically.



Step 13: Maximize the Registration System window by clicking on the maximize button in the upper right corner of this window.



#### LOG INTO THE REGISTRATION SYSTEM

Logging in the Registration System is not required to view a list of FSA University's offered workshops and conferences, but you must log in before registering for a workshop or conference. You must also log in to access your personal registration account. Because the registration process is faster if you log in before searching the list of offerings, it is recommended that you log in each time you access the Registration System.

The focus of this section is to learn:

- ➤ How to log into the Registration System
- How to obtain a forgotten login username
- How to reset a forgotten login password

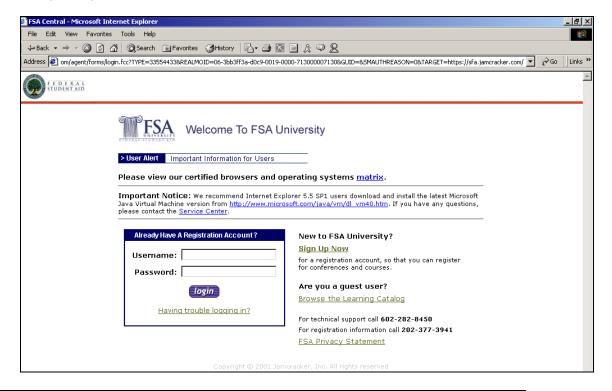
The following sections should be completed before beginning this section:

Create a Registration Account

#### To log into the Registration System:

*Step 1:* From the FSA University Training site, click on the link to the Registration System.

A login page will appear.



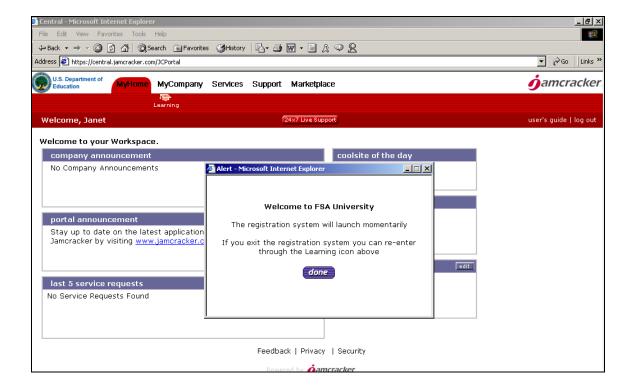


- Step 2: In the "Username:" field, enter your personal username.
- *Step 3:* In the "Password:" field, enter your personal password.

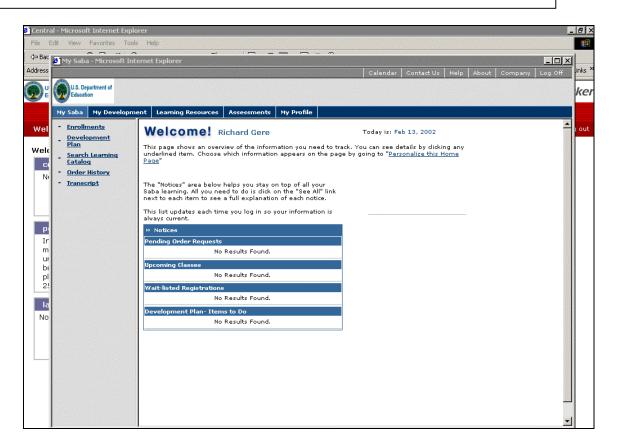
NOTE: YOUR USERNAME AND PASSWORD WERE CREATED WHEN SETTING-UP FOR A REGISTRATION ACCOUNT. IF YOU HAVE FORGOTTEN YOUR USERNAME OR PASSWORD, REFER TO THE SECTIONS BELOW.

Step 4: Click on the "Login" button.

A Jamcracker window and temporary "Welcome to FSA University" window will appear. After a few seconds, the Registration System will launch automatically.







*Step 5:* Maximize the Registration System window by clicking on the maximize button in the upper right corner of this window.

### To retrieve your username if forgotten:

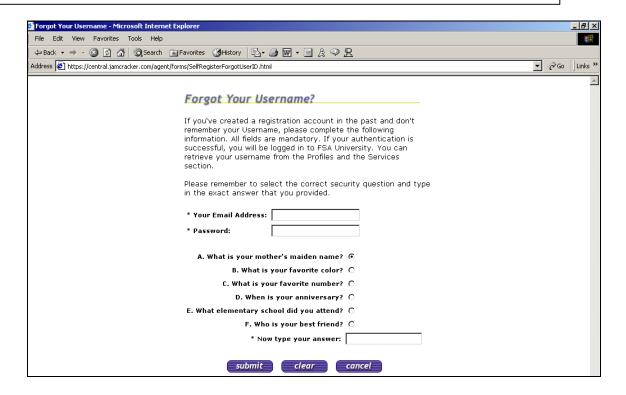
Step 1: If you have forgotten your username, click on the "Having Trouble Logging In?" link on the login page.

A "Login Help" page will appear.

*Step 2:* Click on the "Retrieve Your Username" link.

A "Forgot Your Username?" page will appear.





Step 3: Enter information in all fields on the "Forgot Your Username?" page and click on the "Submit" button.

An email will be sent to you with your username.

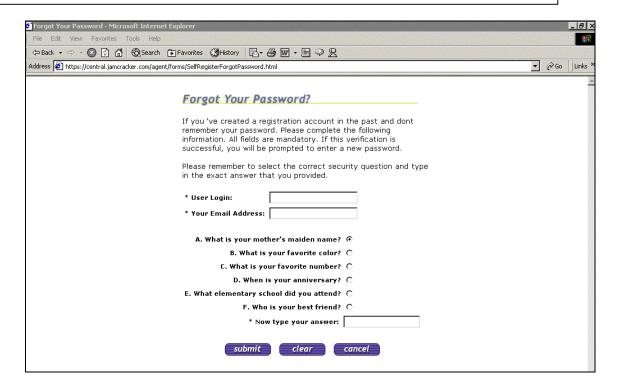
NOTE: THE SECURITY QUESTION AND ANSWER WERE CREATED WHEN YOU SET UP YOUR REGISTRATION ACCOUNT IN THE SYSTEM.

### To reset your password if forgotten:

Step 1: Click on the "Reset Your Password" link on the login page.

A "Forgot Your Password?" page will appear.





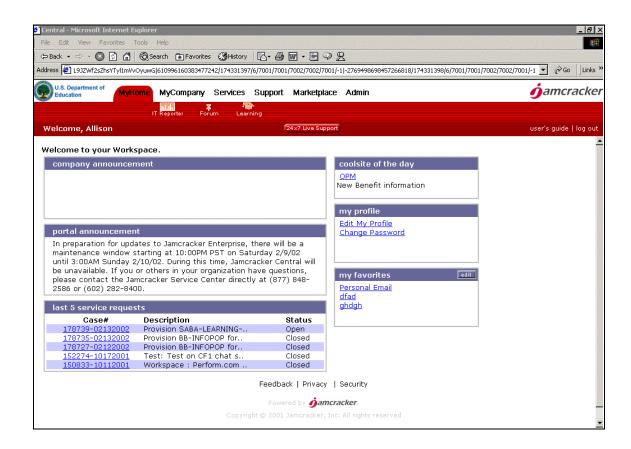
Step 2: Enter information in all fields on the "Forgot Your Password?" page and click on the "Submit" button.

If the selected security question and answer were correct, you will be prompted to change your password and the Jamcracker "My Home" page will open.

NOTE: THE SECURITY QUESTION AND ANSWER WERE CREATED WHEN YOU SET UP YOUR REGISTRATION ACCOUNT IN THE SYSTEM.



Step 3: To launch the Registration System, click on the "Learning" icon on the top navigation bar.





#### SEARCH & REGISTER FOR CONFERENCE OR WORKSHOP

This walkthrough describes the steps of searching and registering for a conference or workshop in the Registration System. Searching for and locating a conference or workshop must occur before registering for a training event. These same steps should be followed for adding your name to a waitlist for a training event. The System allows searching the Learning Catalog by conducting a general or advanced search. Conference or workshop attachments can be viewed while searching the Learning Catalog.

Logging in to the Registration System is not required to view a list of FSA University's offered workshops and conferences, but you must log in before registering for a workshop or conference. You must also log in to access your personal registration account. Because the registration process is faster if you log in before searching the list of offerings, it is recommended that you log in each time you access the Registration System.

The focus of this section is to learn:

- How to search the Learning Catalog for workshops and conferences
- ➤ How to register for a conference or workshop

The following sections should be completed before beginning this section:

➤ Log into the Registration System (recommended if you plan to register for a workshop or conference but not required)

#### To search the Learning Catalog for workshops and conferences:

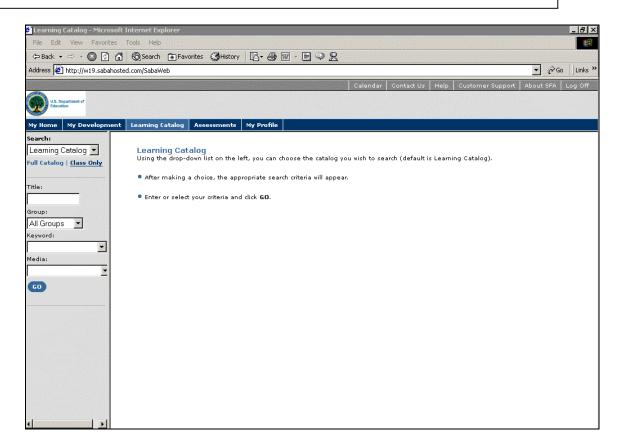
Step 1: Once the Registration System is accessed, either by logging in the System or by clicking on the link "Browse the Learning Catalog", click on the "Learning Catalog" tab in the top navigation bar.

A "Learning Catalog" search page will appear.



# SFA University Registration System Guide

# Prior to Conference/Workshop: Search & Register for Conference or Workshop



Step 2: To conduct an advanced search of the Catalog, enter information in the "Title", "Group", "Keyword", and/or "Media" fields and then click on the "Go" button in the left sidebar. To see the entire Catalog, leave these optional fields empty and click on the "Go" button in the left sidebar.

A list of learning offerings that match the search parameters will appear.

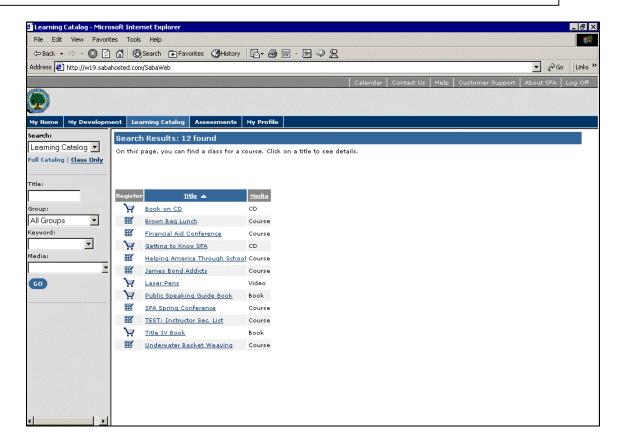
NOTE: A DESCRIPTION OF THE ADVANCE SEARCH FIELDS IS PROVIDED IN THE CHART BELOW.

FIELD NAME	DESCRIPTION	
TITLE	NAME OF ITEM IN THE CATALOG (E.G. CONFERENCE TITLE)	
GROUP	FORMAT OF COURSE (E.G. CONFERENCE, WORKSHOP)	
KEYWORD	GENERAL SUBJECT MATTER OF COURSE (E.G. TECHNICAL, REGULATORY, FINANCIAL MANAGEMENT)	
MEDIA	MEDIA TYPE (E.G. ASSESSMENT, COURSE, ETC.)	



# SFA University Registration System Guide

# Prior to Conference/Workshop: Search & Register for Conference or Workshop



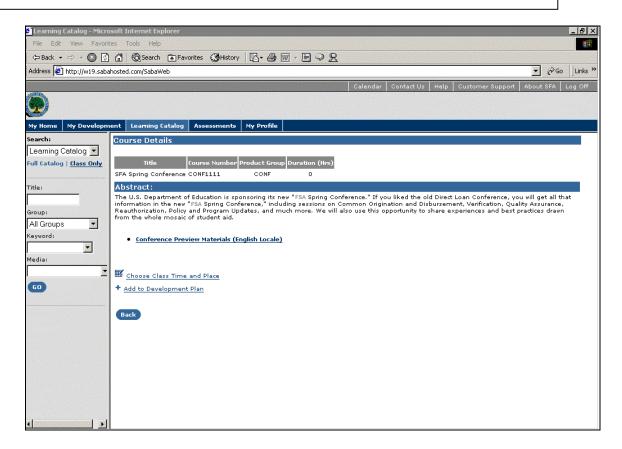
*Step 3:* To view more information on the course, click on the course title link in the "Title" column.

A "Course Details" page will appear.

NOTE: COURSE ATTACHMENTS CAN BE VIEWED FROM THE "COURSE DETAILS" PAGE BY CLICKING ON THE BULLETED LINKS BELOW THE COURSE ABSTRACT.



# SFA University Registration System Guide Prior to Conference/Workshop: Search & Register for Conference or Workshop



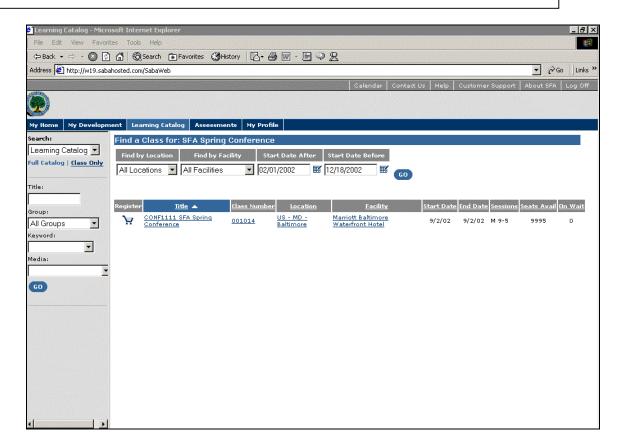
Step 4: To find a list of classes for the selected course, click on the "Choose Place and Time" link.

A "Find a Class: (Course Name)" page will appear.



## SFA University Registration System Guide

# Prior to Conference/Workshop: Search & Register for Conference or Workshop



Step 5: To sort the list of classes by location, facility, or date, select the appropriate option for the "Find by Location", "Find by Facility", "Start Date After", and/or "Start Date Before" fields and click on the "Go" button.

NOTE: MORE INFORMATION ABOUT THE COURSE, LOCATION OR FACILITY CAN BE ACCESSED BY CLICKING ON THE COURSE TITLE, LOCATION, AND FACILITY LINKS RESPECTIVELY.

Step 6: To access more information about a class, click on the class number link in the "Class Number" column.

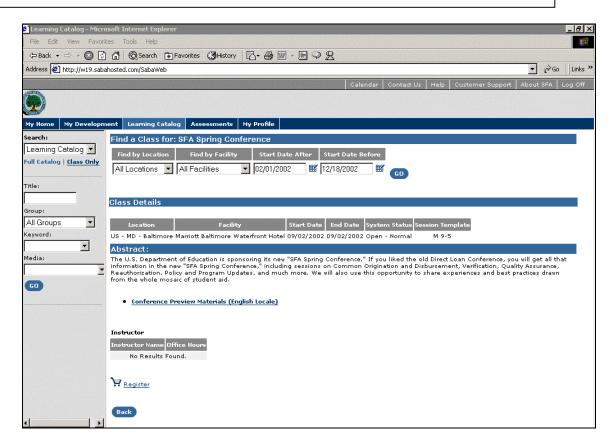
A detailed "Find a Class for: (Course Name)" page will appear.

NOTE: CLASS ATTACHMENTS CAN BE VIEWED FROM THE "CLASS DETAILS" PAGE BY CLICKING ON THE BULLETED LINKS BELOW THE ABSTRACT.



# SFA University Registration System Guide

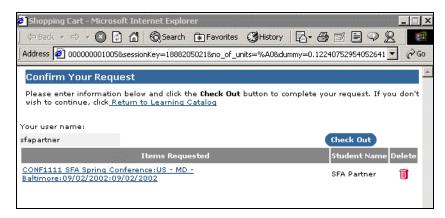
## Prior to Conference/Workshop: Search & Register for Conference or Workshop



## To register for a conference or workshop:

Step 1: Once you have identified the conference session or workshop class for which you want to register, click on the register icon to the left of the course title.

A "Confirm Your Request" window will open. The class selected for registration will be listed.



NOTE: IF YOU HAVE NOT LOGGED IN THE SYSTEM YET, YOU MUST LOG IN BEFORE YOU CAN REGISTER FOR THE CONFERENCE OR WORKSHOP.



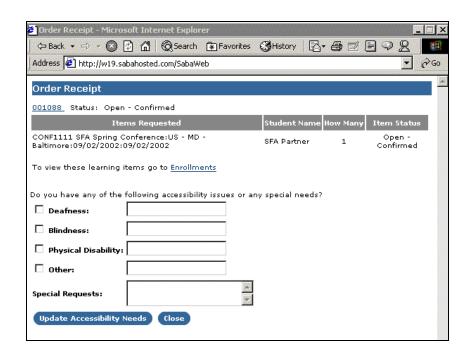
## Prior to Conference/Workshop: Search & Register for Conference or Workshop

NOTE: IF THE WRONG CLASS IS DISPLAYED IN THE "CONFIRM YOUR REQUEST" WINDOW, CLICK ON THE DELETE ICON IN THE RIGHT COLUMN TO REMOVE IT.

NOTE: ADDITIONAL CLASSES CAN BE ADDED TO THE SAME REQUEST FORM. IF MORE CLASSES NEED TO BE ADDED, CLOSE THE "CONFIRM YOUR REQUEST" WINDOW AND CONTINUE SEARCHING AND SELECTING CLASSES FOR REGISTRATION.

Step 2: Click on the "Check Out" button.

An "Order Receipt" window will open. The class selected for registration will be listed.



NOTE: BE SURE TO NOTE THE REGISTRATION STATUS IN THIS WINDOW. IF THE CLASS IS FULL, THIS STATUS WILL BE "OPEN – WAIT LIST". THIS STATUS MEANS THAT THE REGISTRATION HAS BEEN WAITLISTED.

Step 3: Click on the "Close" button, if there are no accessibility needs or special requests.

NOTE: ALL CLASS REGISTRATIONS CAN BE VIEWED BY CLICKING ON THE "MY DEVELOPMENT" TAB.

# Prior to Conference/Workshop: Search & Register for Conference or Workshop

Step 4: If accessibility or other special requests are required, then select the checkbox to left of the appropriate request and describe the need in the text box to the right of the request.

NOTE: USE THE "SPECIAL REQUESTS" FIELD TO DOCUMENT ADDITIONAL NEEDS.

Step 5: Click on the "Update Accessibility Needs" button.

An "Accessibility Update Confirmation" window will appear listing updated accessibility needs or special requests.



*Step 6:* Click on the "Close Window" button.

NOTE: ALL CLASS REGISTRATIONS CAN BE VIEWED BY CLICKING ON THE "MY DEVELOPMENT" TAB.



#### **VIEW & CANCEL REGISTRATION**

Current registrations can be viewed and cancelled in the Registration System. Logging in the Registration System is required to view and cancel current registrations for a conference or workshop.

What is covered in this section:

➤ How to view and cancel registrations

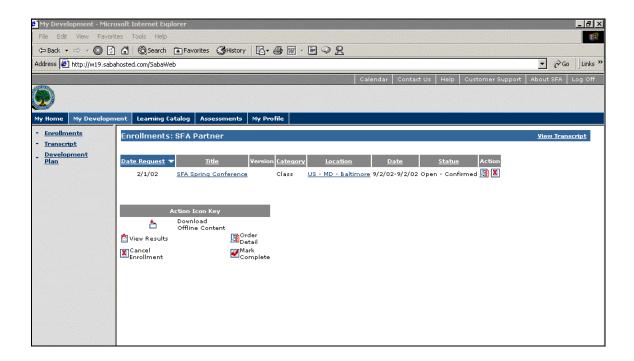
The following sections should be completed before beginning this section:

- Log into the Registration System
- ➤ Search & Register for Conference or Workshop

### To view and cancel registrations:

*Step 1:* Click on the "My Development" tab in the top navigation bar.

An "Enrollments: (Your Name)" page will appear.

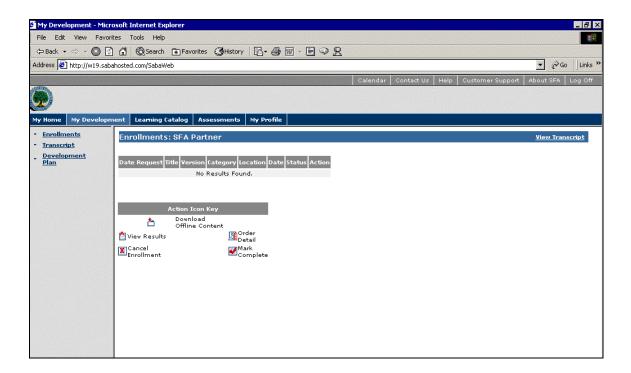




# SFA University Registration System Guide Prior to Conference/Workshop: View & Cancel Registration

Step 2: To cancel a registration, click on the delete icon in the far right "Action" column corresponding with the registration that needs canceling.

An updated "Enrollments: (Your Name)" page will appear with the registration removed.





#### **VIEW TRANSCRIPT**

The Registration System tracks the conferences and workshops you have registered for using the System and attended. You can access this information by viewing your transcript.

The objective of this section is to learn:

How to view personal transcript

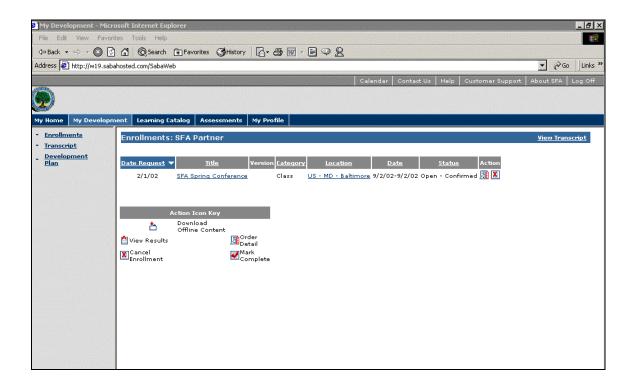
What other sections should be completed before beginning this section:

Log into the Registration System

# To view your transcript:

*Step 1:* Click on the "My Development" tab in the top navigation bar.

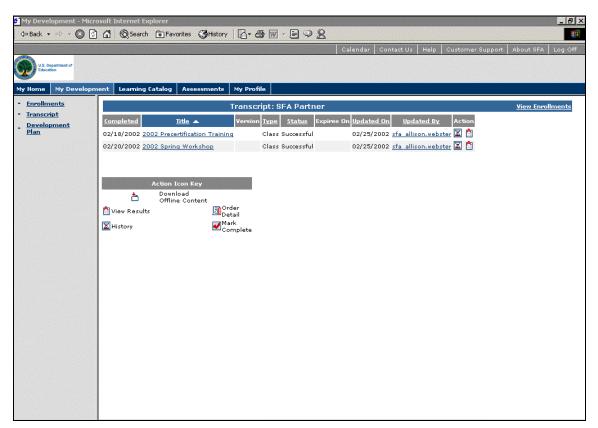
An "Enrollments: (Your Name)" page will appear.





*Step 2:* Click on the "Transcript" link in the left sidebar.

A "Transcript: (Your Name)" page will appear, listing all classes completed.





#### SUBMIT CLASS EVALUATION

The Registration System can also automate the process of gathering feedback about attended training events. Evaluations for all attended conferences and workshops will be available through the System.

The objective of this section is to learn:

➤ How to submit an evaluation

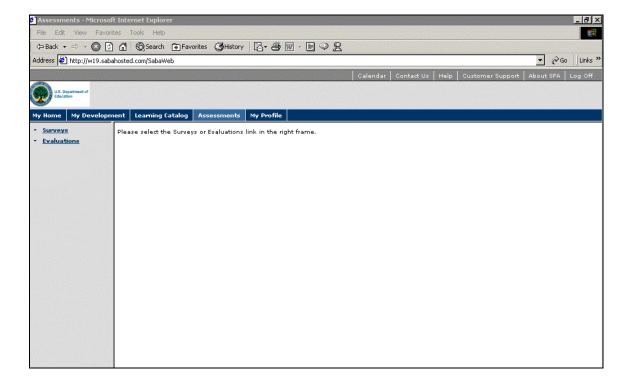
What other sections should be completed before beginning this section:

Log into the Registration System

#### To submit an evaluation:

Step 1: From the "MyHome" page, click on the "Assessments" tab in the top navigation bar.

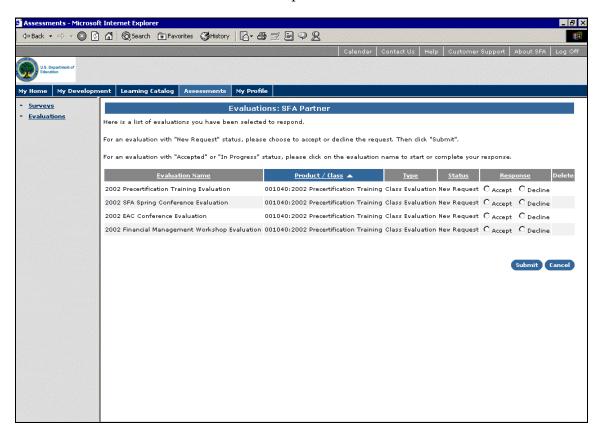
An "Assessments" page will appear.





*Step 2:* Click on the "Evaluations" link in the left sidebar.

An "Evaluations" page will appear, listing evaluations to be completed. A new evaluation has the status of "New Request".



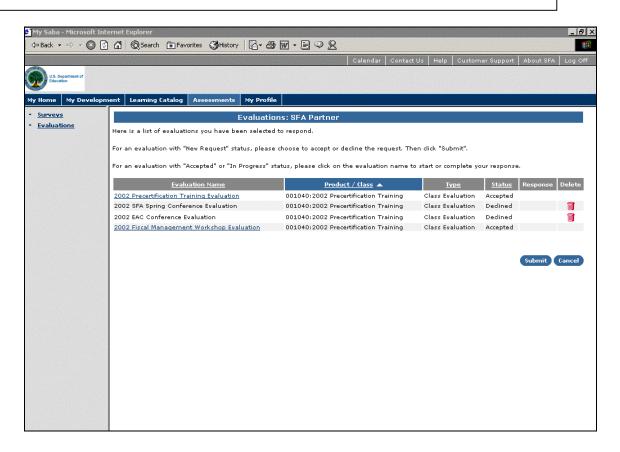
Step 3: Select the "Accept" radio button to accept an evaluation, or select the "Decline" radio button to decline an evaluation.

NOTE: YOU CAN ACCEPT AND/OR DELINE MORE THAN ONE EVALUATION BEFORE CLICKING THE "SUBMIT" BUTTON.

Step 4: Click on the "Submit" button.

NOTE: ONCE AN EVALUATION HAS BEEN ACCEPTED OR DECLINED, ITS STATUS CHANGES TO "CONFIRMED" OR "DECLINED" RESPECTIVELY. AFTER AN EVALUATION IS DECLINED, IT CAN BE DELETED FROM THE EVALUATION LIST BY CLICKING ON THE DELETE ICON IN THE RIGHT HAND COLUMN.

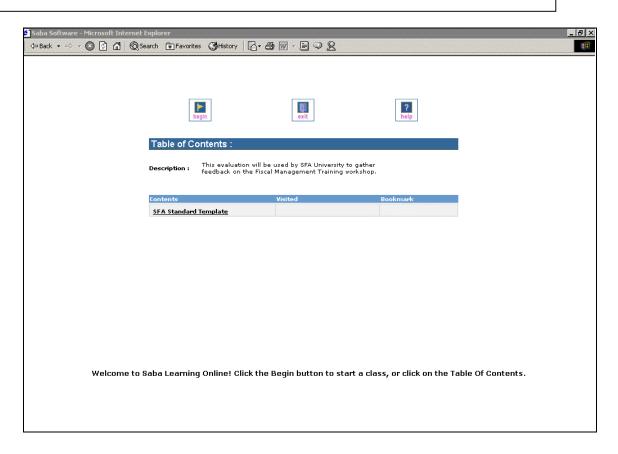




*Step 5:* If the evaluation was accepted, click on the evaluation name link in the "Evaluation Name" column.

A "Welcome to Saba Learning Online" page will appear.



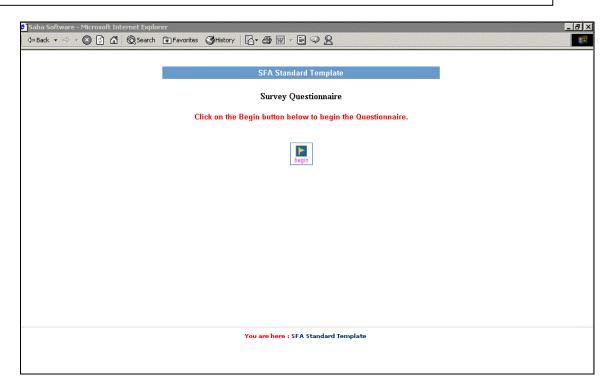


# Step 6: Click on the "Begin" button.

NOTE: IT IS NOT NECESSARY TO ANSWER ALL QUESTIONS IN AN EVALUATION AT ONE TIME. BY CLICKING ON THE "SAVE FOR LATER" BUTTON, IT IS POSSIBLE TO RESPOND TO THE EVALUATION QUESTIONS IN PHASES AND WAIT TO SUBMIT THE EVALUATION UNTIL ALL QUESTIONS ARE ANSWERED.

An introductory page to the evaluation will appear.





NOTE: USE THE NAVIGATIONAL ARROWS AT THE BOTTOM OF EACH QUESTION PAGE TO NAVIGATE FORWARDS AND BACKWARDS THROUGH THE SURVEY.

NOTE: AT ANY TIME WHILE COMPLETING THE EVALUATION, CLICKING ON THE "CLEAR ENTRIES" BUTTON CAN CLEAR ALL ENTRY RESPONSES.



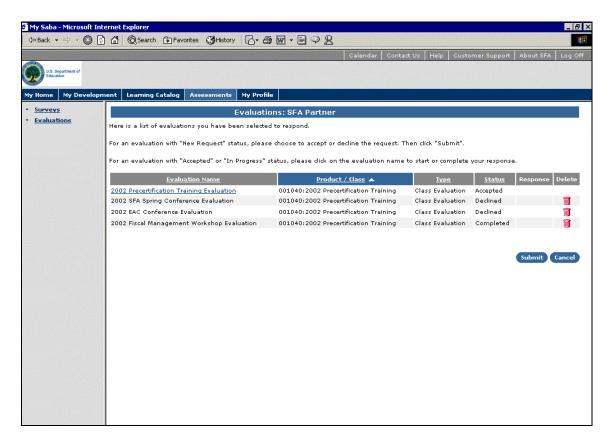
- *Step 7:* Complete the evaluation questions and click on the "Submit" button.
  - A pop-up window will open, asking "Are you sure you want to submit the Test?"
- Step 8: Click on the "OK" button.
- *Step 9:* Click on the "Exit" button.

A pop-up window will open, asking "Are you sure you want to Exit?"



# Step 10: Click on the "OK" button.

The "Evaluations: (Your Name)" page will appear. The status of the finished evaluation is marked "Completed."



NOTE: ONCE AN EVALUATION HAS A STATUS OF "COMPLETED", THEN IT CAN BE DELETED FROM THE EVALUATION LIST BY CLICKING ON THE DELETE ICON IN THE RIGHT COLUMN.



#### **VIEW & EDIT PERSONAL PROFILE IN REGISTRATION SYSTEM**

Each user in the Registration System creates a personal profile when setting up their registration account in the System. A personal profile includes information such as your name, email address, and work phone number. Keeping this information upto-date is important so that FSA University and the System can work effectively.

The objective of this section is to learn:

➤ How to view and edit Registration System personal profile

What other sections should be completed before beginning this section:

➤ Log into the Registration System

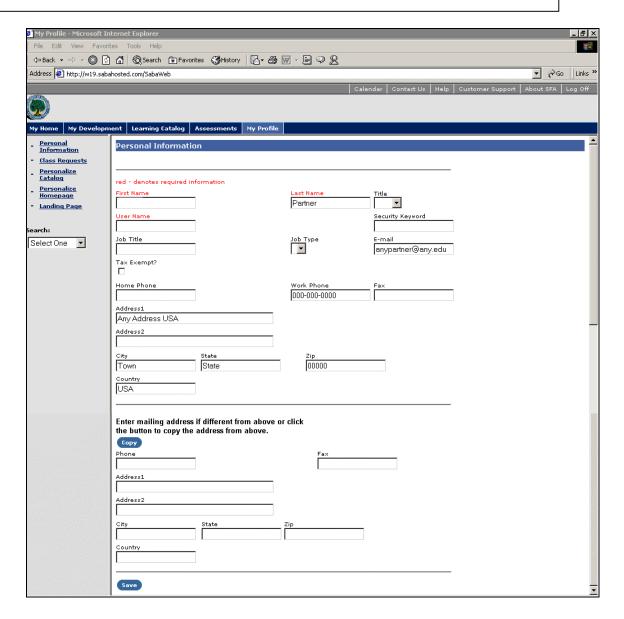
### To view and edit personal profile:

Step 1: From the "MyHome" page, click on the "My Profile" tab in the top navigation bar.

A "Personal Information" page will appear.



# SFA University Registration System Guide Maintenance: View& Edit Personal Profile in Registration System



- *Step 2:* Edit the necessary fields of the "Personal Information" page.
- Step 3: Click on the "Save" button.

A "Save Status" page will appear with the message, "Your personal information was updated successfully".



#### CUSTOMIZE "MY HOME" PAGE

The Registration System enables you to customize your "My Home" page. You can use these customizations to determine the time frame reflected on the "Home Page" (e.g. upcoming registrations within the next 90 days), notices to be displayed (e.g. upcoming events, surveys/evaluations awaiting response, waitlisted registrations), quick links (i.e. links that appear in the left sidebar), and personal web links (i.e. FSA University's Training Site).

The objective of this section is to learn:

How to customize the "My Home" page

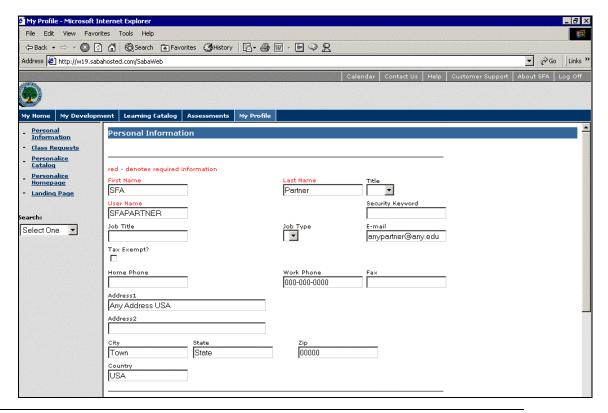
What other sections should be completed before beginning this section:

Log into the Registration System

## To customize the "My Home" page:

*Step 1:* From the "My Home" page, click on the "My Profile" tab in the top navigation bar.

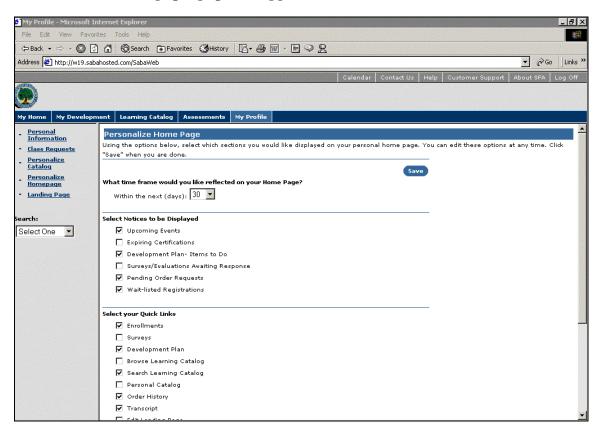
A "Personal Information" page will appear.





Step 2: Click on the "Personalize Homepage" link in the left sidebar.

A "Personalize Homepage" page will appear.



Step 3: Edit settings on "Personalize Home Page" page.

NOTE: A CHECKMARK TO THE LEFT OF A SETTING INDICATES THAT THE NOTICE OR LINK WILL APPEAR ON THE "MY HOME" PAGE.

Step 4: Click on the "Save" button.

A "My Home" page will appear, reflecting the personalized changes identified on the "Personalize Home Page" page.



#### CHANGE PASSWORD

Your login password to the Registration System should be changed periodically. Changing your login password is the only activity that must be done using the Jamcracker portal.

The objective of this section is to learn:

How to change your login password

What other sections should be completed before beginning this section:

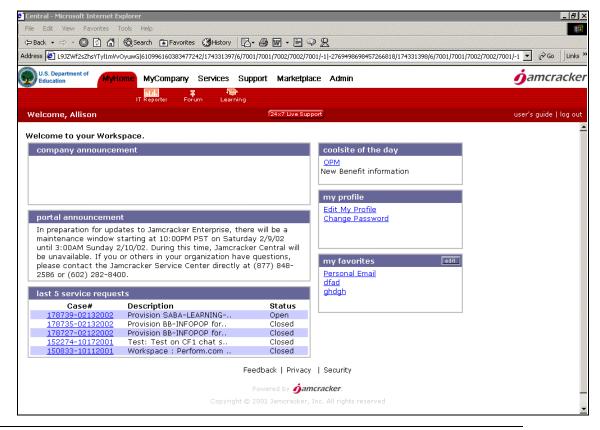
Log into the Registration System

## To change your login password:

Step 1: Close the Registration System window after logging in.

A Jamcracker "My Home" page will be visible.

NOTE: THE REGISTRATION SYSTEM WINDOW IS THE SMALLER WINDOW THAT OPENED OVER ANOTHER BROWSER WINDOW.





Step 2: From the Jamcracker MyHome page, click on the "Change Password" link.

A "Change Password" page will appear.



- Step 3: In the "Old Password" field, enter old password.
- *Step 4:* In the "New Password" field, enter new password.

NOTE: THE LOGIN PASSWORD MUST BE AT LEAST 6 CHARACTERS IN LENGTH AND CONTAIN BOTH NUMBERS AND LETTERS. PASSWORDS ARE CASE SENSITIVE.

- Step 5: In the "Confirm New Password" field, enter new password again.
- Step 6: To save changed password, click on the "Submit" button.

  A "Password Change Confirmation" page will appear.
- Step 7: Click on the "Done" button to return to the Jamcracker MyHome page.

NOTE: TO LAUNCH THE LEARNING MANAGEMENT SYSTEM AGAIN, CLICK ON THE "LEARNING" ICON ON THE TOP NAVIGATION BAR.